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ABSTRACT

This checklist, one of seven related documents, presents the basic steps recommended for use by a project coordinator or steering committee during the implementation of a new project or program. The steps are divided into three major sections, implementation readiness, preimplementation, and implementation. Each section includes the steps, with suggested tasks for each step, necessary to complete that phase. The checklist can be used in two ways. First, those responsible for implementation can use the list to organize each phase of the implementation process, checking off each task as it is completed. The checklist is also designed as a formative evaluation tool for use by the implementation planning and monitoring groups. As a phase or step nears completion, the group can refer to the checklist to be sure that all critical tasks have been completed and decide whether the next phase or step can begin.
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RESEARCH AND DEVELOPMENT UTILIZATION PROJECT

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Implementation checklist of steps

This checklist presents the basic steps recommended for use by a project coordinator or steering committee during the implementation of a new project or program. The steps are divided into three major sections, implementation readiness, pre-implementation and implementation. Each section includes the steps, with suggested tasks for each step, necessary to complete that phase.

The checklist can be used in two ways. First, those responsible for implementation can use the list to organize each phase of the implementation process, checking off each task as it is completed. The checklist is also designed as a formative evaluation tool for use by the implementation planning and monitoring group(s). As a phase or step nears completion, the group can refer to the checklist to be sure that all critical tasks have been completed and decide whether the next phase or step can begin.

This is a "cookbook" approach to planning which has already proven effective in many school systems which have time and resource restrictions. As with a recipe, however, any ingredient or step which is left out will effect the quality of the outcomes.

Implementation Readiness Steps

If the suggested process during the previous problem solving phase, **Solution Selection**, have been followed, the system is now ready to begin the pre-implementation planning tasks. The solution selection phase had two major objectives: (1) to systematically select the projects (or parts of projects) which would best meet the system or schools' unique needs and (2) to pave the way for the planning committee to effectively address the tasks of pre-implementation. The first thing to do, then, is to determine whether the system has, in fact, completed all the solution selection tasks and is therefore ready to proceed to pre-implementation. This is actually a transitional step that will assure a continuity of process.

Experience has proven that there are several kinds of tasks that are sometimes given less than adequate attention during the selection phase. Listed below are a series of questions on those tasks which are critical prior to any pre-implementation activities. The group responsible for solution selection should be able to respond with a "yes" to each of these. If any of these tasks have not been completed, it will be imperative to go back and take care of these before going on.

- ☐ 1. Have the target areas for project implementation been identified (students, staff, administration, schools, etc.)?
- ☐ 2. Have all restrictions or limitations imposed on the proposed project/program by local circumstances been identified and are they deemed solvable during pre-implementation?
 - objectives -- organization & scheduling
 - resources -- costs
 - personnel -- fit with present curriculum
 - etc.
- ☐ 3. Have the superintendent, principals and staff carefully examined the proposed project/program and given tentative approval to continue with planning for implementation?
- ☐ 4. Has the group at least generally assessed the possible impact of the project/program on staff (attitudes, roles, skills, processes) and is there confidence that any potential problems can be solved during implementation?
- ☐ 5. Has an outside resource person with expertise in implementation been identified to provide regular advice and support during the upcoming phase?

Pre-Implementation Steps

- ☐ Step I. Provide an orientation to the program steering committee on the over-all processes of the implementation. The orientation should include at least
 - ☐ A. A clear statement of the purpose of planning for implementation.
 - ☐ B. A list of specific tasks which the planning will require and individual committee assignments of those tasks.
 - ☐ C. A rough time-line for the completion of committee tasks.
 - ☐ D. An agreed upon process to complete committee tasks
- ☐ Step II. Identify and incorporate final policies and procedures to facilitate implementation.
 - ☐ A. Establish a clear, detailed communication network
 - intra project
 - between the project and the rest of the system
 - between the project and the community.
 - ☐ B. Identify methods and points for data collection and evaluation
 - ☐ C. Design staff development plans
 - staff development needed prior to implementation
 - tentative plan for staff development which might be needed during implementation

- ☐ D. Finalize a budget in as much detail as is possible.
 - ☐ E. Communicate with at least one first-generation adoptor of the proposed program and get reactions to the pre-implementation plans.
 - ☐ F. Establish a detailed project time-line (in addition to the committee time-line).
 - ☐ G. Finalize pre-implementation strategy.
- ☐ Step III. Identify and provide required facilities, equipment, supplies and materials.
- ☐ Step IV. Select and assign staff (participants)
- ☐ A. Survey staff to determine (and create) interest in the project.
 - ☐ B. Identify key people.
 - ☐ C. Ascertain staff competencies to perform project roles.
 - ☐ D. Assign staff to various project roles based upon interest and ability.
- ☐ Step V. Develop a positive organizational climate for implementation.
- ☐ A. Prepare a special presentation to the Board with support from the superintendent.
 - ☐ B. Introduce the staff to the program.
 - ☐ C. Publicize the project to the community.
- ☐ Step VI. Formulate a detailed evaluation design.
- ☐ A. Develop evaluation of program, staff and learners.
 - ☐ B. Develop both *formative* and *summative* evaluation plans.
- ☐ Step VII. Provide necessary pre-implementation staff training.
- ☐ A. Carefully explain (and perhaps demonstrate) the new program
 - ☐ B. Develop ownership in participants.
 - ☐ C. Provide for development or revision of materials or modification of intended program as indicated by participant response and suggestions
- ☐ Step VIII. Determine the parameters of the schedule.
- ☐ A. Compare desired project scheduling needs with existing school and learner schedules.
 - ☐ B. Modify project and/or school and student schedules to allow project to fit into larger organizational context.
- ☐ Step IX. Review all pre-implementation tasks for completion and accuracy before moving on to actual implementation.

Implementation Steps

- ☐ **Step I. Install your program.**
 - ☐ A. Insure leadership roles and direction of the program at the initiation level.
 - ☐ B. Insure distribution of all materials necessary to initiate the program.
 - ☐ C. Meet at least weekly with representative groups of participating staff and the steering committee for the first 4-6 weeks.
- ☐ **Step II.* Promote a continuous commitment to the implementation of the program.**
 - ☐ A. Maintain procedure for continuous decision making.
 - ☐ B. Maintain contact with and increase commitment from top policy leadership.
 - ☐ C. Review implementation policy procedures
 - Compare actual activities with specified program objectives.
 - Observe and monitor program at operational level.
 - ☐ D. Review and revise budget as needs dictate.
 - ☐ E. Maintain and improve specific staff competencies through training and consultant help at all levels.
- ☐ **Step III.* Maintain a positive climate through participatory management**
 - ☐ A. Maintain flexibility in school staff
 - Provide for altering job descriptions as modification needs arise.
 - Maintain systematic procedure for communicating project staff strengths and weaknesses.
 - ☐ B. Make provision for redefinition of roles.
 - ☐ C. Make necessary changes in student or school schedules.
 - ☐ D. Involve students in program assessment and modification.
 - ☐ E. Maintain workable meeting schedule to allow for problem solving and suggestions; meet at least monthly.
 - ☐ F. Clarify procedure for program direction.
 - ☐ G. Establish continuing relationship between new and existing programs
 - Provide for coordination of new programs and ongoing related curriculum areas.

*Note: Steps II-V are actually parallel steps. These steps indicate major kinds of activities which should be carried on more or less simultaneously throughout implementation.

- Continuously incorporate program objectives and content into existing curriculum.

☐ H. Maintain external communication to facilitate understanding of program operations.

☐ Step IV.* Maintain flow and coordination of material.

☐ A. Develop classroom inventory of material.

☐ B. Maintain an instructional material resource center.

☐ Step V.* Continue formative evaluation procedures.

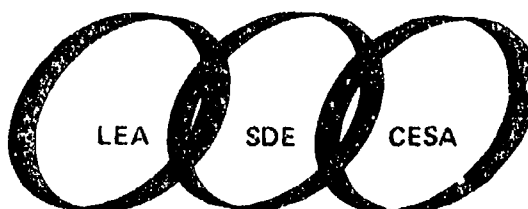
☐ A. Use data to allow for changes and adaptations.

☐ B. Develop appropriate recommendations based on experience with program operations and formative data.

☐ C. Provide feedback of evaluation data.

☐ D. Maintain record keeping system.

☐ Step VI. On the basis of summative evaluation, design program modifications and prepare for second year of implementation.



This document was developed by Steve Preston for the RDU Resource Center, with thanks to Wanda Gray and Susan Preston. For further information, call or write

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